



# Storyboard

## Provider Interface- Change Passwords, Invoicing & Payments

This storyboard demonstrates how to change passwords, invoice and to review payments

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# Provider Interface

## Step 1: Reviewing the Provider View Screen

Private Providers will be able to Change their Password and be able to view Incomplete Invoices, Invoice History, Payments, and Receivable History.

The screenshot shows the top navigation bar of the TFACTS system. On the left, there is a logo for the Department of Children's Services (TN). On the right, it says "Welcome to TFACTS!". Below the navigation bar, there is a user status bar indicating "Logged In: 1" and "[Holston United Methodist Home for Children] Log off". Below this is an "Action List" menu with the following items: "Change Password", "Receivable History", "Payment View", "Incomplete Invoices (207)", and "Invoice History".

## Step 2: Change Password

1. Click **Change Password**

This screenshot is identical to the one above, but the "Change Password" link in the "Action List" menu is highlighted with a red rectangular box.

2. Enter **Current Password**, **New Password**, and **Confirm New Password**
3. Click **Save**

The screenshot shows the "Change Password" form. It contains three input fields: "Current Password: \*", "New Password: \*", and "Confirm New Password: \*". Below the fields, there is a password requirement notice: "Password must be at least 8 characters long and must contain at least 3 of the following:" followed by a bulleted list: "Upper case letters", "Lower case letters", "Digits", and "Symbols (!@#&\*%^(){}|:;<>?\_+=-)". At the bottom of the form, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red rectangular box.

### Step 3: Receivable History

4. Click **Receivable History**



5. View Transactions under the **Vendor Receivable History**
6. Click **Close** to return to prior screen

The screenshot shows a table titled 'Vendor Receivable History' with the following data:

Transaction Date	Status	Transaction Type	Amount	Action	Invoice Number	Voucher Number	Payment Date	Warrant Number
10/07/2021	Pending	Debit	(\$3,720.00)	Receivable	JEW0321L2CFC	3856230	04/15/2021	0004579659
10/07/2021	Pending	Debit	(\$3,600.00)	Receivable	JEW0421L2CFC	3909638	05/19/2021	0004629924

Below the table is a pagination control showing '10 items per page' and '1 - 2 of 2 items'.



### Step 4: Incomplete Invoices

Invoices are generated once a month for DCS children who were placed in a provider setting during the previous month. These invoices are available on each provider’s **Incomplete Invoices** list in the early part of each month so that dates of service can be reviewed and confirmed by the provider staff for payment.

1. Click **Incomplete Invoices**



2. The **Incomplete Invoice Search Criteria** displays and allows the user to filter by **Search Criteria, Primary Sort**, or **Secondary Sort**, or the user can click **Search** to view all **Incomplete Invoices**.

**Note:** If a selection is made using the **Search Criteria** field, this will open additional search fields; Invoice Number, Period End Date, Person Id, Person Name, Region – If any of these are selected, there will be additional boxes that display in order to complete the search.

Click **Search** to display results or **Clear Form** to clear Search Criteria

Incomplete Invoice Search Criteria

Search Criteria:

Primary Sort: **Invoice Number**  
 Period End Date  
 Person Id

Secondary Sort: Person Name  
 Region

Order By: Asc

Order By: Asc

Search Clear Form

**Incomplete Invoice Search Results** displays the **Period End Date, Region, Person Name, Description** and **Rate**.

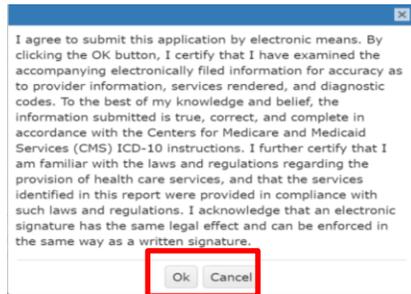
4. Enter **Invoice Number** by clicking within the **Invoice number** field
5. Enter the **Begin** and **End** date by clicking within the date field, then tab over for the **Total Days** and **Total Amount** calculate. (Example: 10/5/20-10/30/20 would be entered as Begin = 5, End Date =30. If child is at placement from 10/1-10/30 the Begin = 1 and End = 30. The system will calculate the Total Days x the Rate = Total Amount.)
6. Click the magnify icon to search for the **ICD code** if it did not auto-generate from the Monthly Summary.
7. Click **Submit**

Incomplete Invoice Search Results

Period End Date	Region	Person Name	Description	Rate	Invoice Number	Begin	End	Total Days	Total Amount	ICD Code
09/30/2020	Northeast	Boa (11)	Level 2 Continuum Level 2 Continuum	\$120.00	Example	1	30	30	\$3,600.00	<input type="text"/>

Submit

8. A pop-up message will display, click **OK** or **Cancel** to be returned to the Invoice screen



**Note:** After clicking **OK**, if there are any discrepancies with the invoices, Validation Errors will display, and those errors will need to be corrected before the invoices are able to be submitted successfully.

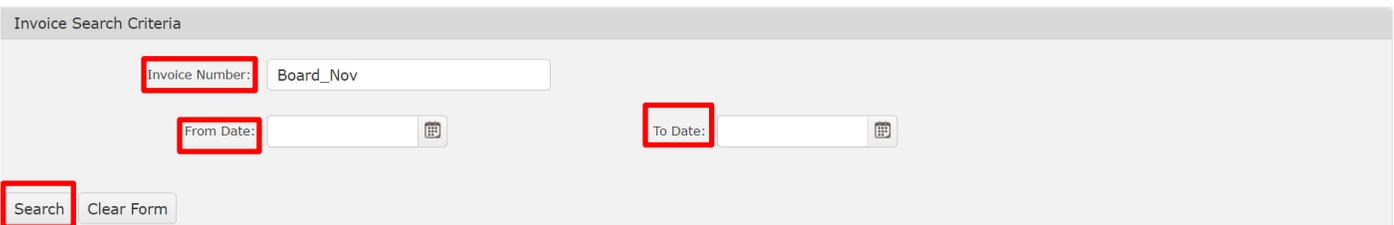
## Step 5: Invoice History

1. Click **Invoice History**

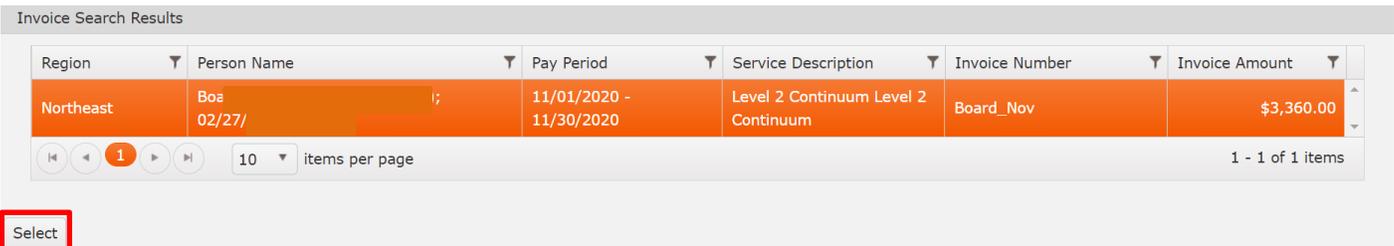


The **Invoice Search Criteria** displays and allows the user to filter by **Invoice Number, From Date, or To Date**.

2. Enter Search Criteria information
3. Click **Search** or **Clear Form**



4. Invoice Search Results display, Highlight the row and click **Select**



The Invoice Detail displays exactly what has been entered (Date, Invoice Number, Pay Period, Invoice Amount, Resource Name/Address and what amount to expect for payment).

Line Items display Status of Invoice, Client Name, Description (contract level), Term= Days @ Rate, Amount.

A Status of **Processed** shows the invoice has been submitted and is ready to be sent to Edison.

5. Click **select** to view the **Line Item** details of the Invoice

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**Invoice Detail**

Invoice Date: 10/06/2021  
Pay Period: 06/01/2021 - 06/30/2021 Invoice Number: Cla  
Invoice Amount: \$3,600.00 Invoice Billing Amount: \$3,600.00  
Resource Name: Holston United Methodist Home for Children  
Address: 404 HOLSTON Dr GREENEVILLE, TN 37743  
Phone: (423) 247-3007

**Edison Vendor Information**

Vendor ID: 0000090080  
Vendor Address Sequence Num: 1 Vendor Location: MAIN

**Line Items**

	Status	Name	Description	Term	Amount	Billable Amount
<input type="button" value="select"/>	Processed	Clark	Level 2 Continuum Level 2 Continuum	06/01 - 06/30; 30 Days \$120.00	\$3,600.00	\$3,600.00

10 items per page 1 - 1 of 1 Items

Status: Completed

Close

6. Click **Close** to return to prior screen

**Line Item Detail**

Client Name: Bennett, Kyhl 2156); DOB/Age: 01/02/2014 (7 Yrs)  
Service Request: Bennett, Kyhl 2156); Level 3 Continuum Special Needs;  
12/01/2020 - 01/01/2021  
Service Rate: Continuum: Level 3 Special Needs  
Begin Date: 12/01/2020 End Date: 12/31/2020

Number of Days: 31  
Rate Amount: \$ 216.00  
Total Amount: \$ \$6,696.00  
Amount: \$6,696.00

Confirmed Date: 02/26/2021 Confirmed By: Chad Shaw  
ICD Code: Z6221  
Status: Processed

Close

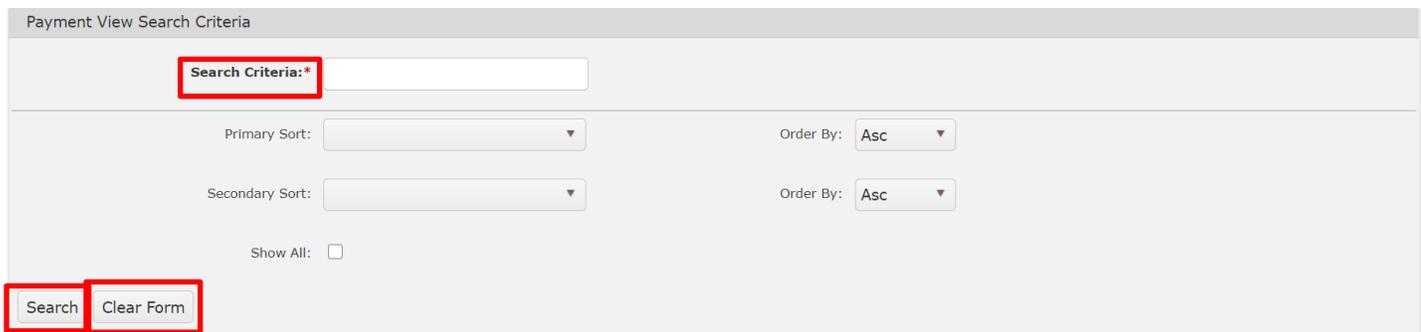
## Step 6: Payment View

1. Click **Payment View** to check the Payment Status of an Invoice

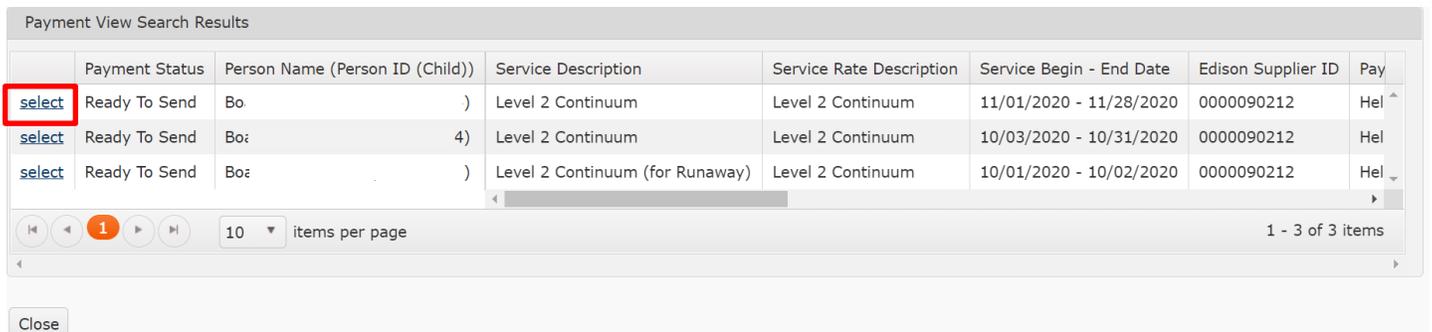


### Payment View Search Criteria displays

2. Select applicable criteria from **Search Criteria\*** dropdown; depending on what criteria is being used, the system will prompt additional fields to perform the search.
3. Click **Search** or **Clear Form**



4. **Payment View Search Results** display. To view the payment information, click **select** next to the row that is to be reviewed.
5. The **Payment Status** will display **Ready To Send** until it has been paid; once the Invoice has been paid, the Payment Status changes to Paid.



**You have completed this storyboard.**